



soCMS Content Management System User Guide

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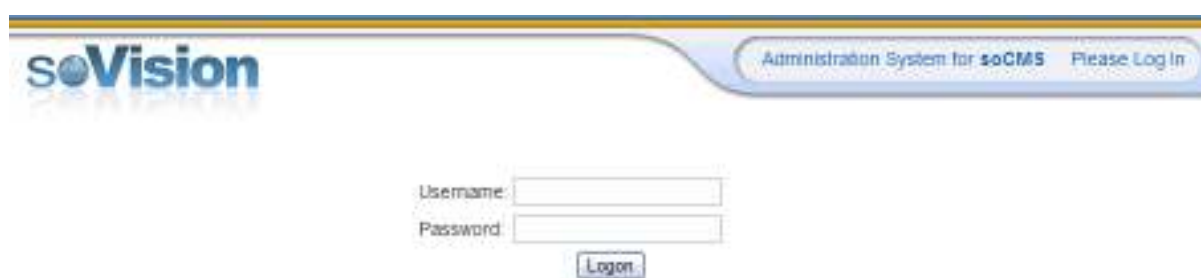
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1. Overview

The soCMS Content Management System (CMS) allows you to control your site, editing page content and uploading images as well as altering the site structure by adding new pages and removing pages. The site has been designed specifically for you and the administration system ties directly in with your main website, meaning any changes you make within the admin system will automatically reflect on it.

2. Logging in and Logging Out

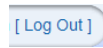
The soCMS system has a secure login area, encrypting passwords to ensure privacy. When you first access the admin side of your site (generally your site URL with /admin on the end. E.g. www.yoursite.com/admin) you will be presented with the following logon screen.



The image shows the login interface for the soCMS Administration System. At the top left is the soVision logo. At the top right, it says "Administration System for soCMS" and "Please Log In". In the center, there are two input fields: "Username:" and "Password:". Below these fields is a "Logon" button.

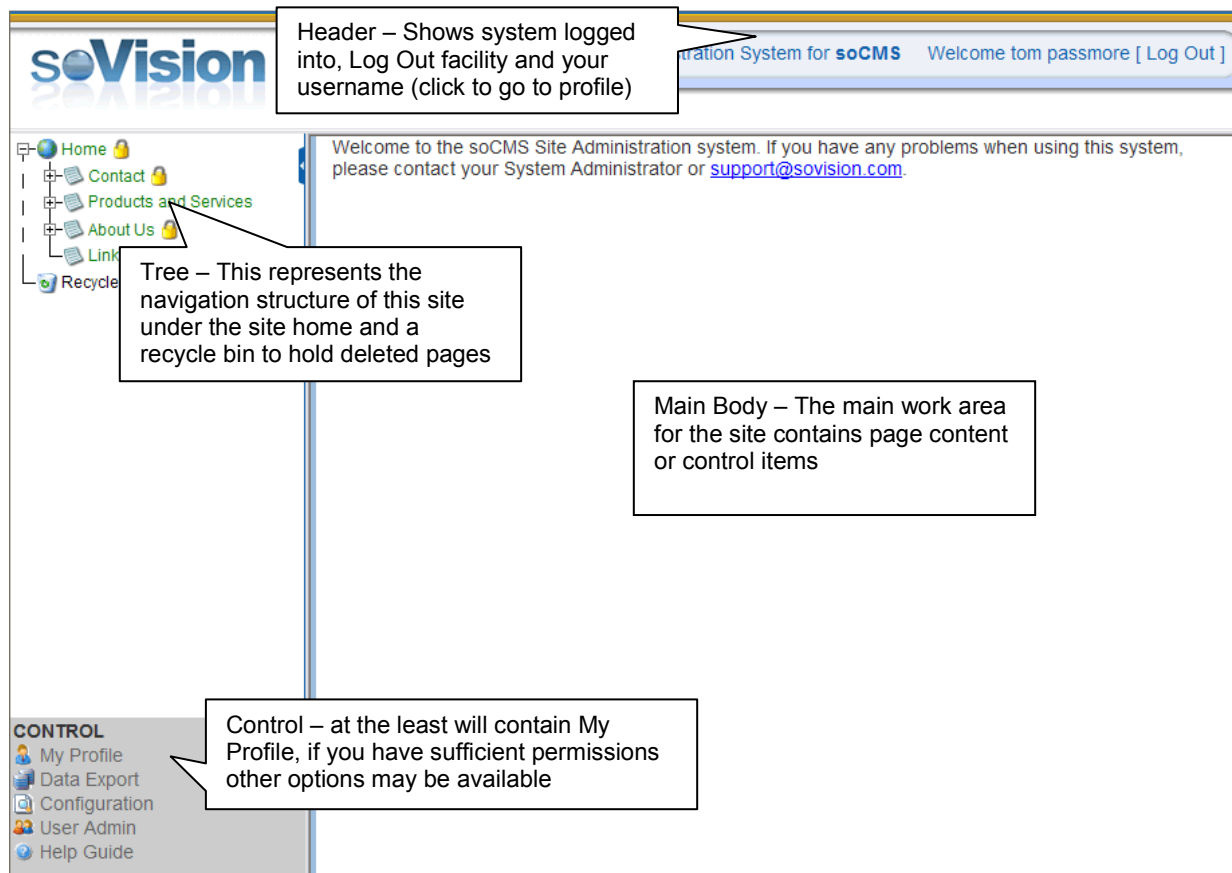
Type in your username and password and click Logon. Your username and password will then be authenticated and you will be logged in.

You should always properly log out of the soCMS system rather than just navigate away to a different web page or closing the page down (especially if you share your machine) to do this click on the

 link next to your username in the top section.

3. Application Layout

When you log into the soCMS system you will see the following layout, the soCMS system has distinct areas divided to allow you to control the individual sections; they are laid out as follows;



4. What does What - Button Definitions

Throughout the site most of the buttons are self explanatory because they are text buttons, others are graphical and the following button definitions apply;



- Save



- Delete



- Move up or down (this will move the selected row)

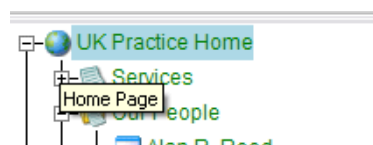
5. Using the Treeview

The treeview is a graphical representation of your navigation structure as well as a repository for deleted items in the recycle bin. Using the treeview you can easily navigate to page, create pages and sub pages, delete pages and move pages up and down (if you have permission). You can also easily identify the different page types and the page status (e.g. if the page is active).

a. Page types and icons

Your system has 7 different page types within it. Some are system types which can not be added or deleted (for example the home page or predefined pages such as forms).

Within the tree you can identify the page by matching the image icon or by moving your mouse cursor over the icon and a tooltip will appear describing the type. (You must have clicked inside the treeview area to activate it)



The different icons represent the following page types;

System Pages – You will have at least 1 of these setup and can edit content within them but can not add or delete more of them

-  **Home Page**, the home page for the site, you are able to change its content (this is a system type, you can only have one of these and it is added at design time. You can not delete it)
-  **Predefined Page**, a system specific page, you are able to change its content (this is a system type, you can not add them, they are added at design time and hold content such as enquiry forms. You can not delete them.)

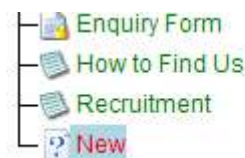
User Pages – Pages that you are able to create, modify and delete

-  **Standard Page**, a standard content page, you can change content and add images, it can be a sub item and can have sub items
-  **Link (external reference)**, a link that will appear in the navigation that links to another site.
-  **List Holder (holds an on page listing)**, this page displays sub items (list items) within the page itself rather than the menu. This could be used for announcements, or other list type pages.
-  **List Item**, these items can only be created as sub items to a list holder. This is the individual item to display on the list, e.g. each announcement.
-  **List Item – Custom**, another type of list item with greater display flexibility. This is the individual item to display on the list, e.g. a person.
-  **No Page Type Associated**, you will be prompted for a type to build the page

b. Page Status and Colours

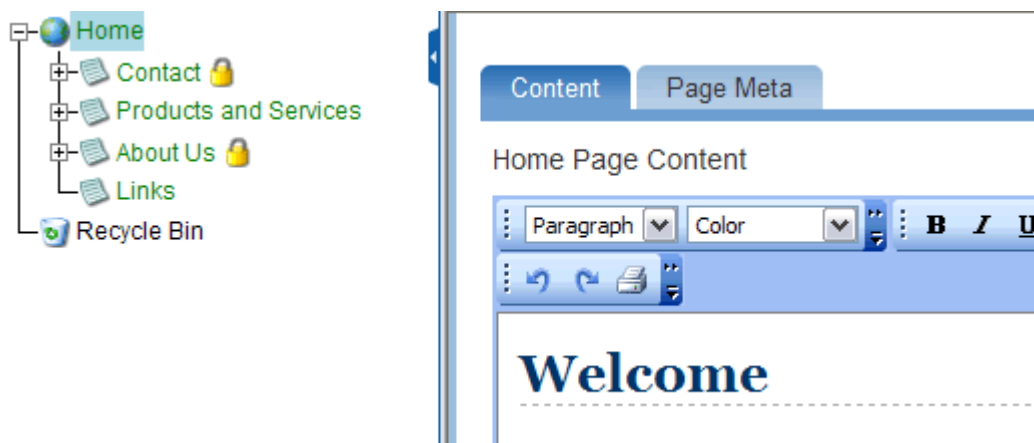
Each page has an active status. Pages that are non active will not display on the main site which means you can setup a page and get it ready for inclusion on the site and then set its status to active when you are ready for it to appear.

The tree shows which pages are active or inactive by colour. Green depicts an active page and red an inactive page.



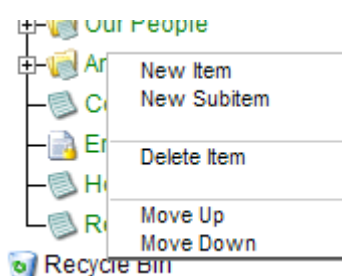
c. Selecting items

To select an item from the tree and display the relevant content in the main window all you need to do is click on the item. Once selected the line will be highlighted to depict that you have selected it and the main area will load with the required content.



d. Right click menu

Working with the tree you are able to perform a number of actions other than just selecting the page if you have the required permissions. By right-clicking on an **item** in the tree (not necessarily the selected item) a menu will appear with a number of options. These are discussed in section [6.b.i](#), [6.e](#), [6.f](#), [7.a](#), [7.b](#), [7.c](#)



6. Page Control

You are able to control pages by either selecting a page and making amendments or deleting it. Or by using the right menu to add, move or delete.

a. Editing an existing page

To edit a previously created page all you need to do is select the item in the tree and the content will load in the main screen.

Some pages within your system may have a locked icon  at the end of the page name. If so, these pages can only be changed by using your [soSupport](#) credits.

b. Creating a page

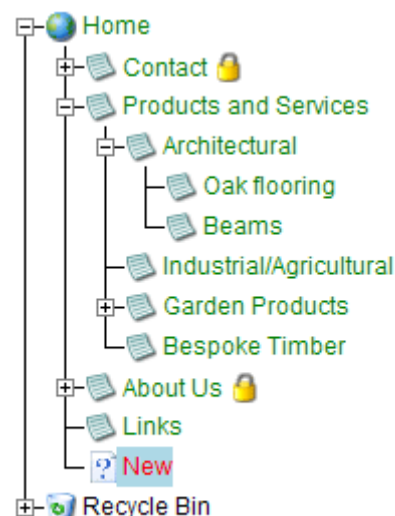
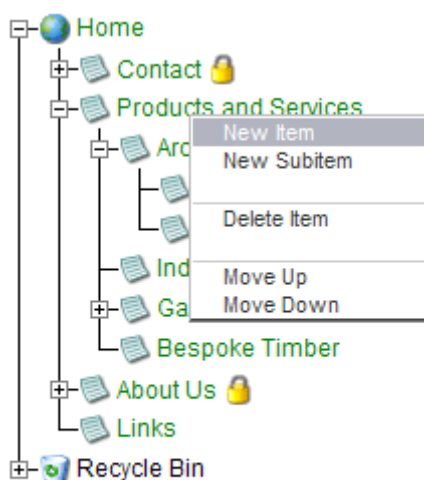
To create a page you need to use the right click menu, be sure to select the appropriate parent or item at the relevant level when creating a new page. See Sub-Item or Item below;

New Item
New Subitem
Delete Item
Move Up
Move Down

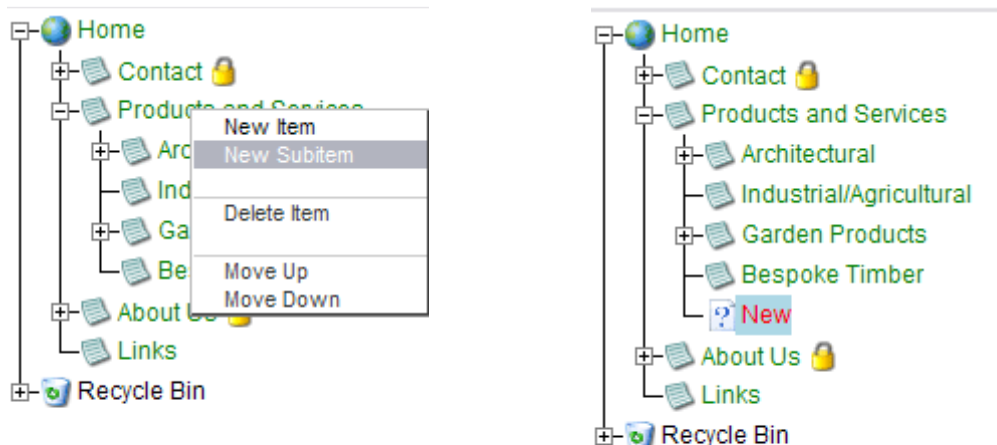
i. Sub Item or Item

Whichever item you right click on you will get a relevant menu, e.g. if you click on the home page you will only get the menu option 'New Sub item' whereas clicking on other items you will get the full menu as above.

Look at the example below if we have right clicked on 'Products and Services' we get the screen on the left. If we choose 'New Item' at this level ('Products and Services') we will create a new item at this level e.g. below the current items parent. In this case this is 'Home'. The result is the image on the right (by default new items go to the end of the item list).



As another example, using the same scenario where we have right-clicked on 'Products and Services' but this time we selected 'New Sub Item', this time the parent is the item we have selected and the item is going to be created as a sub item of it. The result is shown on the right (again the item has been added to the end of the list).



Items will always be created with an unknown page type, a name of new and will be inactive.

ii. Selecting a page type

Once you have created a new page, the main content area will change and you will be prompted to choose a page type. Page type definitions can be found under [5a](#).

Some pages can not have sub items such as list items and can only be added if their parent is of a particular type. This normally only applies to a list holder and a list item, you will be notified if any exclusions have occurred.

This pages parent is of a type that doesn't support this selection. This may be the case where you are trying to add a list item to a parent which is not a list holder

Page Type (Please Select)

Standard Page
Link (external reference)
List Holder (holds an on page listing)
> List Item [Specific to - List Holder (holds an on page listing)]
> List Item - Custom [Specific to - List Holder (holds an on page listing)]

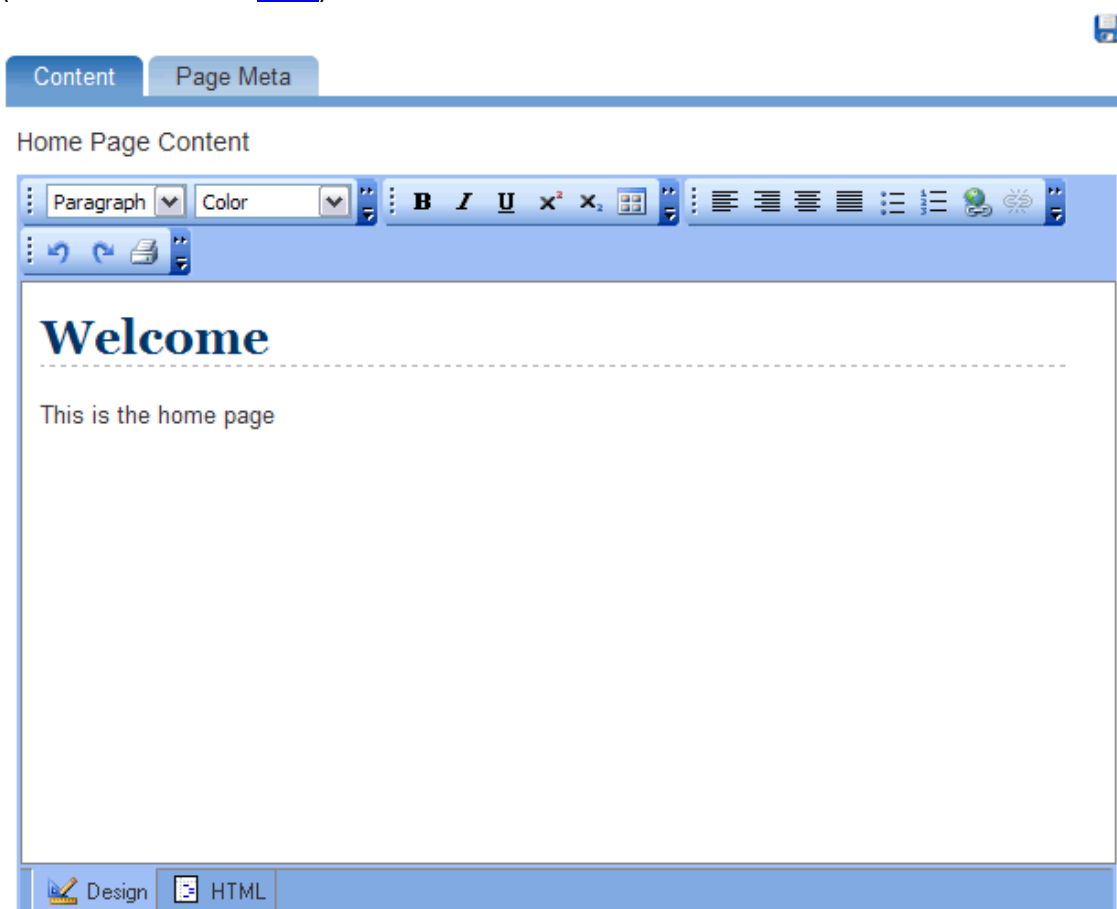
Select

c. Page types and content

Once you have selected a page type the main page will change to represent the selected type. The different types and the content that can be filled in are outlined below

i. Home Page

The home page type is system controlled, it can not be deleted (as you can see in the image there isn't a delete icon) and you can only have one of them within a web project. You can however change the content that displays on the page and any related Page Meta information (Generic screen - see [6.c.ix](#)).

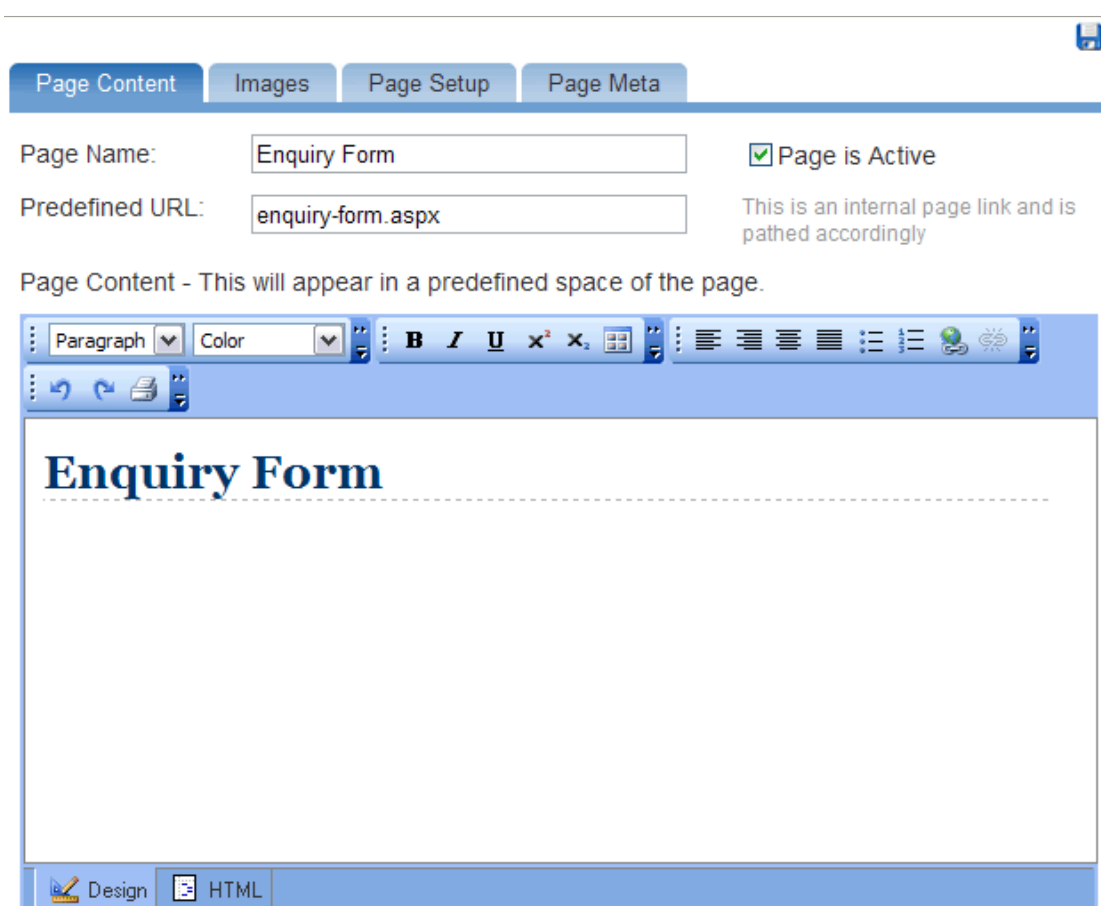


Use the editor as you would word, some system styles have been setup to provide consistent styles e.g. for Heading 1 style, and an Italic version of Heading 1, as well as heading 2, Heading 3, Heading 4, Heading 5, Heading 6 and Paragraph.

ii. Predefined Page

A predefined page is a system created page, you can not add or delete them but have the ability to make changes. These are pages created specifically for a purpose e.g. a form. If space has been designated on the predefined page then content and images will appear. See below for definitions of Images, Page Setup and Page Meta

Page Name	-	Your name for the page, this will display in titles, navigation
Predefined URL	-	As a system page this relates to the internal linked page
Page Content	-	Additional content to display on the page
Page is Active	-	if active will display on the front end otherwise hidden



Use the editor as you would word, some system styles have been setup to provide consistent styles e.g. for Heading 1 style, and an Italic version of Heading 1, as well as heading 2, Heading 3, Heading 4, Heading 5, Heading 6 and Paragraph.

iii. Standard Page

A standard page is the page you would normally use for content, you are able to add, edit and delete these pages, create them as items and sub items. You can upload content, images, make changes to page setup and page meta.

Page Name	-	Your name for the page, this will display in titles, navigation
Page Content	-	The main content for the page
Page is Active	-	if active will display on the front end otherwise hidden




Content
Images
Page Setup
Page Meta

Page Name:
☒ Page is Active

Page Content

Paragraph
 Color
 B I U x² x₂

List icons and other formatting tools

Products and Services

This is all about our products

Design
 HTML

Use the editor as you would word, some system styles have been setup to provide consistent styles e.g. for Heading 1 style, and an Italic version of Heading 1, as well as heading 2, Heading 3, Heading 4, Heading 5, Heading 6 and Paragraph.

iv. Link (external reference)

A link page is used to link to an external URL, ensure you enter the full path to the URL. You can create this where required, they are not actual pages but links to other sites.

Page Name	-	Your name for the page, this will display in titles, navigation
Link URL	-	The full path to the site
Link Target	-	Whether to open the new site in the current window or new.
Page is Active	-	if active will display on the front end otherwise hidden



Link Detail

Page Name:	USA Immigration	☒ Page is Active
Link URL:	../us/us-immigration	Provide the full path to the page. E.G. http://www.sitetolinkto.com/pagetolinkto.htm
Link Target:	This Window ▼	

v. List Holder

A list holder, holds list items, you can set various properties as to how the list displays. You can create, modify and delete list holders.

Page Name	-	Your name for the page, this will display in titles, navigation
Page is Active	-	if active will display on the front end otherwise hidden
Items per page	-	The number of list items to display, paging will occur if goes over
Number of columns	-	The number of columns to display the list in, Default 1
Number of Characters	-	Number of characters of list item to display within the list
Display Date	-	Display the date of the list item on the list
Sort Items	-	Sort the list items to be displayed within the list holder
Display Content	-	Where to display the list holder content, default above
List Holder Content	-	Content to display




Content | Page Setup | Page Meta

Page Name:

☒ Page is Active

Items per page:

Number of items to display on each page (Default blank), leave blank to include all

Number of columns:

Number of columns (Default = 1) e.g 2 would create columns 2 list items across - --- | ---

Number Characters:

Number of characters of the item listing to display (Default = 250) e.g leave blank for full listing

Display date: ☐

Display the date on the item listing (Default = true)

Sort items by:

List Holder Content : Display content the list items.

Paragraph | Color

































Our People

Design | HTML

Use the editor as you would word, some system styles have been setup to provide consistent styles e.g. for Heading 1 style, and an Italic version of Heading 1, as well as heading 2, Heading 3, Heading 4, Heading 5, Heading 6 and Paragraph.

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vi. List Item

List items can only be created as sub items to a list holder, you can add, modify and delete list items.

Item Title	-	Your name for the page, this will display in titles, on list holder
Page is Active	-	if active will display on the front end otherwise hidden
Item Date	-	as required, will display if list holder setting allows, default today
Display Holder Content		Do you want to display the list holder content.
Content Location	-	Where to display the list holder content, default above.
Item Content	-	Content to Display.



Content

Images

Page Setup

Page Meta

Item Title: ☐ Page is Active

Item Date: 

Display List Holder Content ☐

above

 the item on the main list item page.

Item Content

Paragraph

Color

B *I* U ~~x~~ ~~x~~ 


























Design

HTML

Use the editor as you would word, some system styles have been setup to provide consistent styles e.g. for Heading 1 style, and an Italic version of Heading 1, as well as heading 2, Heading 3, Heading 4, Heading 5, Heading 6 and Paragraph.

vii. List Item – Custom

A List Item Custom is a type of list item with greater control over its appearance. It can only be created as a sub item to a list holder, you can add, modify and delete a List Item Custom.

Item Title	-	Your name for the page, this will display in titles, on list holder
Page is Active	-	if active will display on the front end otherwise hidden
Item Date	-	as required, will display if list holder setting allows, default today
Display image on list page		On the list holder as items do you want the image to display
Display Holder Content		Do you want to display the list holder content.
Content Location	-	Where to display the list holder content, default above.
List Content Area 1 / 2		2 Distinct content areas, can be controlled as describe below.

Item Content Area 1 and Item Content Area 2 have properties as to whether the area is displayed on the list holder page and/or on the list item page.




Content | Images | Page Setup | Page Meta

Item Title: ☐ Page is Active

Item Date: 

List Item image properties on LISTHOLDER
Display Image on list page: ☐

List Item properties on LISTPAGE
Display List Holder Content
☐ above the item on the main list item page.

Item Content Area 1 Display on List ☐ Display on Item Page ☐

Paragraph | Color | **B** | *I* | U | x² | x₂ | 

 |  |  |  |  |  |  | 

 |  | 

Design | HTML

Item Content Area 2 Display on List ☐ Display on Item Page ☐

Paragraph | Color | **B** | *I* | U | x² | x₂ | 

 |  |  |  |  |  |  | 

 |  | 

Design | HTML

All of the settings from the parent list holder apply except for Number of Characters due to the fact that List Item Custom has specific display properties for content areas.

Use the editors as you would word, some system styles have been setup to provide consistent styles e.g. for Heading 1 style, and an Italic version of Heading 1, as well as heading 2, Heading 3, Heading 4, Heading 5, Heading 6 and Paragraph.

viii. Generic Screen – Images

Depending on the page type you may have a tab for uploading and associating images with a page. You can browse to an image, enter a caption and upload. Images are formatted once uploaded to the server to optimise for the web, only specific image types and sizes can be uploaded - settings for this are in the [configuration](#) section.

Once images are uploaded and the page is active they will be displayed on the front screen in the order displayed in the admin section. If you want to re order the images use the up/down arrows.

To edit the caption of an image, select a row by clicking on it and choose 'Edit', make changes and then save. Note you can not edit the actual image, if you want to change this you will have to delete and then add the new one.

To delete an image, select the row by clicking on it and choose 'Delete'

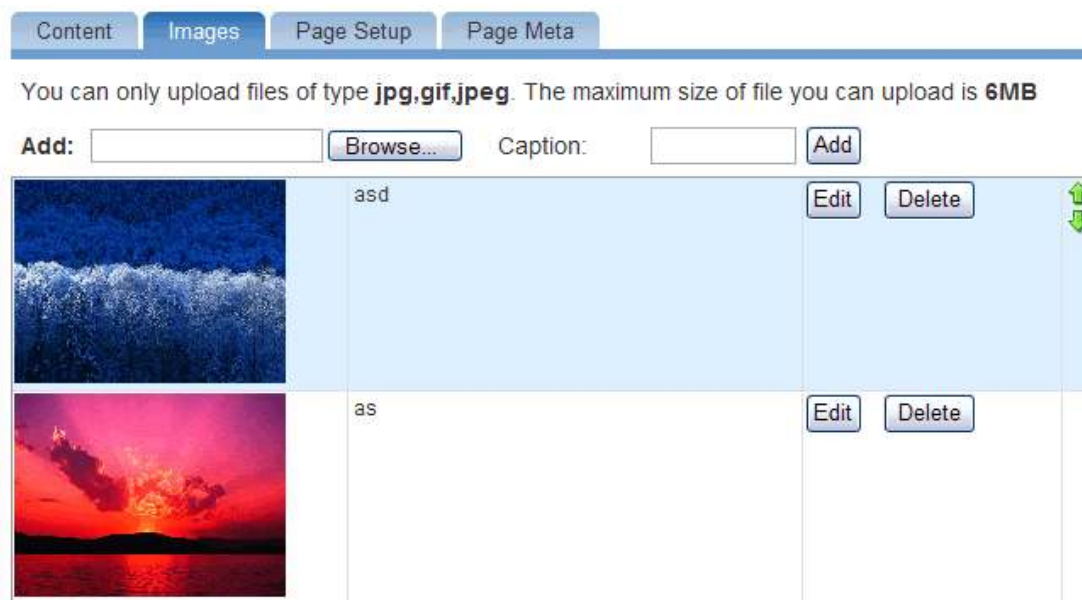


Image	Caption	Actions	Order
	asd	Edit Delete	↑ ↓
	as	Edit Delete	

ix. Generic Screen – Page Setup

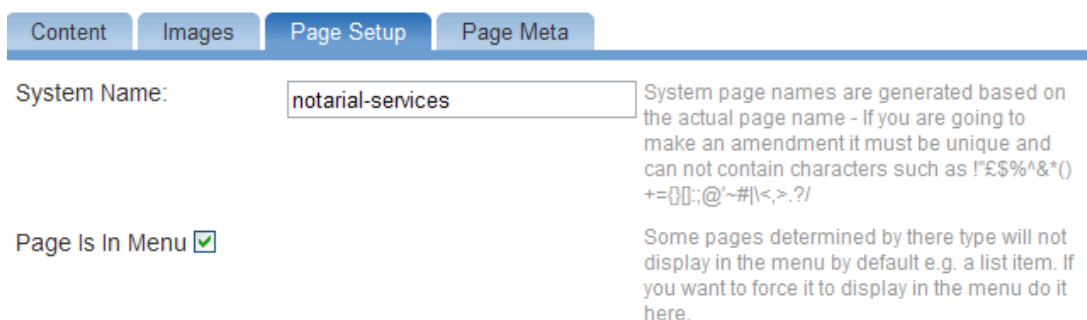
Depending on the page type you may have a tab for Page Setup, although this is generally a system page you have the ability to make changes here if required.

System Name

This makes up the internal URL link to the page. You may change this but it must not contain spaces or special characters and must be unique. It is probably best to let the system handle this as it is automatically generated based on the page name

Page Is In Menu

You can decide to whether to show pages in the menu/navigation, different page types by default have different settings. For example list item pages are not included in the menu as they display on the list holder page.



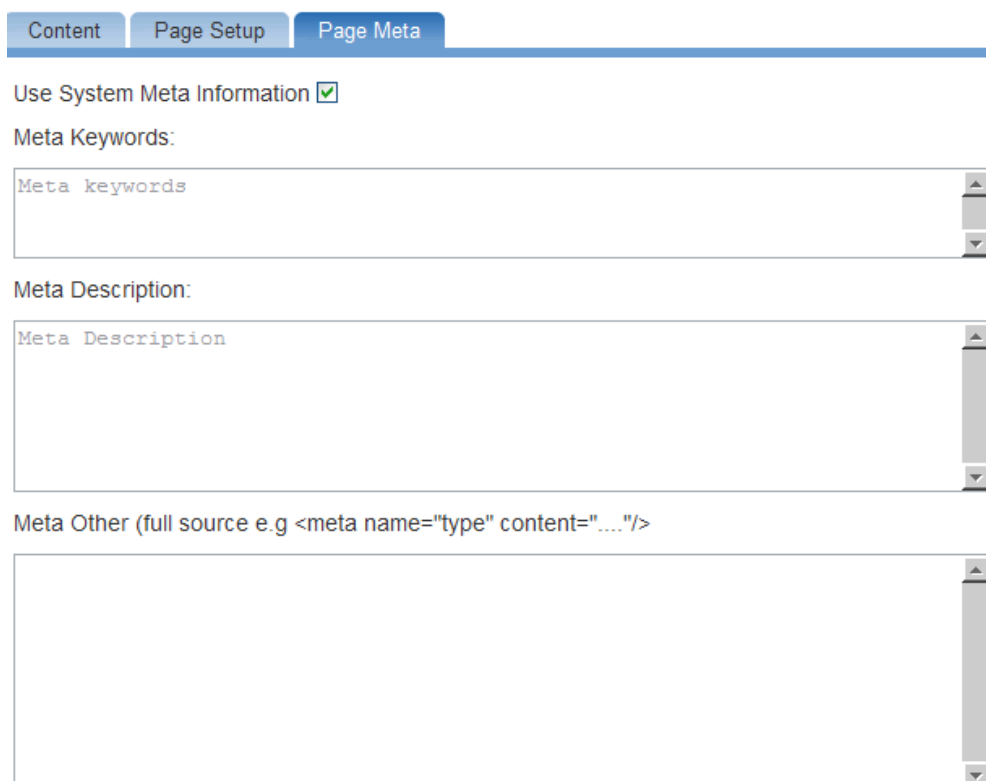
Content Images **Page Setup** Page Meta

System Name: System page names are generated based on the actual page name - If you are going to make an amendment it must be unique and can not contain characters such as !"£\$%^&*()+=[]{};@'~#|\<.>./

Page Is In Menu ☒ Some pages determined by there type will not display in the menu by default e.g. a list item. If you want to force it to display in the menu do it here.

x. Generic Screen – Page Meta

All pages within the soCMS system allow you to add page specific meta information. Within the configuration section you can set global meta which will then display on each page that hasn't been modified to contain page specific meta. Checking or un-checking the 'Use System Meta Information' will use the global or allow you to enter page specific meta



Content **Page Setup** Page Meta

Use System Meta Information ☒

Meta Keywords:

Meta Description:

Meta Other (full source e.g. <meta name="type" content="...."/>)

d. The importance of System Name.

As described in Generic Screen – Page Setup it is important to have a unique name for the System Name field as it relates to the link generated for the page.

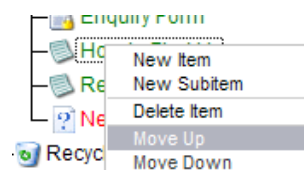
The system will attempt to create you a unique identifier based on the page name but if you have 2 pages called the same the system will generate a system name by adding a number to the end, this is not particularly SEO friendly and it is suggested that in this case you modify the system name to better represent the page.

For example; If I already had a page under navigation Florida > Accountants (this system name e.g. link would be accountants) and I was going to create another page under California > Accountants the system would generate a system name of accountants0, it may be more prudent in this case to amend the system name to california-accountants to better represent the page.

e. Getting the page in the right place – Moving a page.

When you create a new page using the right click menu, whether the page is a new item or a new sub item it will be added to the end of the appropriate section. You are able to move pages within their section up and down accordingly.

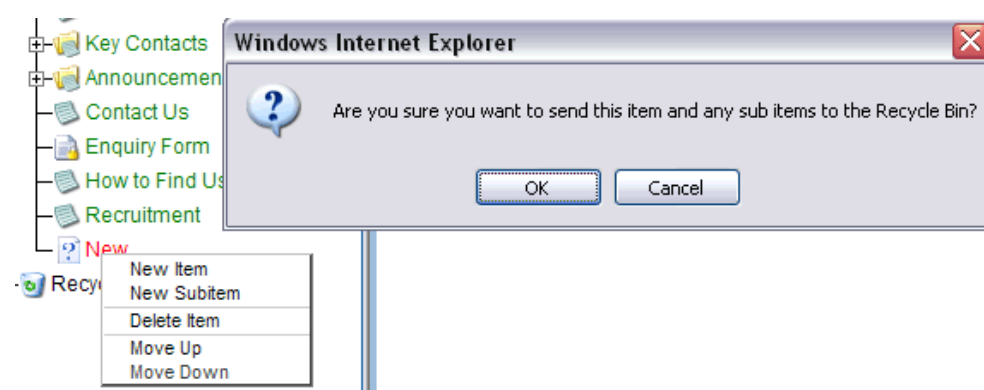
Right click on the page you want to move and click move up/ move down to move the page within the tree and subsequent navigation.



f. Deleting a page

The soCMS system implements a recycle bin so that you can delete items from the tree navigation to the recycle bin and either restore them back to the tree or delete them fully.

If the page is a type which can be deleted then you can delete the page either by clicking on the delete icon on the page detail screen. Or by right clicking and choosing delete from the menu. You will be prompted to ensure you want to send the item and any sub items to the recycle bin.



7. Recycle Bin Functionality

The recycle bin allows you to delete items from the tree with the option of restoring it or deleting it fully.

a. Restore Item

To restore an item from the tree, right click on the individual item you want to restore and choose restore. If the items parent no longer exists then you won't be able to restore it.



b. Delete Item

Once an item has been deleted to the recycle bin you are able to fully delete it. Right click on the item and choose Delete Item, you will be prompted to ensure you want to delete the item and all of its sub items.



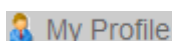
c. Empty Recycle Bin

You are able to delete all items from the recycle bin by right clicking on the bin itself and choosing Empty Recycle bin, you will be prompted to confirm you want to perform this action.



8. Your profile

You can access your profile by either clicking on your name in the header or by clicking on the My Profile link within the CONTROL section.



a. Amending your details

You are able to amend your details, but not permissions by clicking on edit, making the required changes and clicking 'Save'.

User Profile:

Firstname: soVision

Lastname: soVision

Username: soVision

Password:

Email: info@sovision.com

Permission Type: Read / Add / Modify

Cancel

Save

b. Changing your password

To change your password you need to access your profile, you can do this by clicking on your name in the header or by clicking on the My Profile link within the CONTROL section.



Click 'Edit' to amend your details, change your password and then click save. Changes will not be applied until you logout and then log back in.

User Profile:

Firstname:	soVision	Lastname:	soVision
Username:	soVision	Password:	
Email:	info@sovision.com		

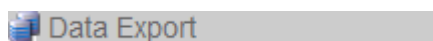
Permission Type: Read / Add / Modify

9. Further functionality

This further functionality is only available if you have the required permissions, if you think you should be able to access these facilities but can't please contact your system administrator.

a. Data Export

The data export facility allows you to export information from the system. This generally applies to information captured from customers filling in forms. The information can be exported in either CSV format which can be opened by excel , or as xml. To access the Data Export facility click on the 'Data Export' link within the CONTROL section.



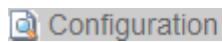
You will then be presented with a screen similar to the following, depending on the data you can export you may have other exports available to you. Select the radio button of the required export and click either 'Export CSV' or 'Export XML' the data will pop up in a new window.

Data Export

Email Addresses	☐
Enquiry Contact	☐

b. Configuration

The configuration section allows you to setup global data settings for the site and global Page Meta, to access the configuration settings click on the 'Configuration' link within the CONTROL section.



i. Settings

The settings control various parts of the site in terms of image properties, list item defaults and site settings such as email and date formats. The window will look similar to that below, most of the information is self explanatory if you need further information on these settings please don't hesitate to contact us, [soSupport](#)

General	System Meta
Image Specifications	
> by entering both width and height the image will be scaled and cropped > if you only enter a width OR a height the image will be scaled in proportion	
Image Width	
Image Height	500
Imagethumb Width	160
Imagethumb Height	
Max Size (in MB e.g. 4MB = 4)	6
Image Types allowed.	jpg,gif,jpeg
List Item	
> Default values passed through to List Items	
Number Characters	250
Number Columns	1
Display Date	☒
Site Settings	
Site Email (seperate with ;)	tom@sovision.com;tim@s
Mail From	tom@sovision.com
Date Format	dd MMM yyyy
Save Cancel	

ii. Global Page Meta

Within the global meta page you are able to setup generic meta information that will be used for every page on the site unless that page has overridden these settings. Once you access the Configuration area click on the System Meta tab.

The meta keywords and Meta description can be entered as plain text as these will automatically be wrapped in relevant meta tags. If you do wish to add other meta information, use the 'Meta Other' section but include the full meta source e.g. `<meta name="Copyright" content="My Company">`

General

System Meta

Meta Keywords:

Meta keywords

Meta Description:

Meta Description

Meta Other (full source e.g `<meta name="type" content="...."/>`)

Save

Cancel

c. User Administration

If you have the required permissions you are able to add, modify and delete users for the soCMS system. To access the User control click on the 'User Admin' link within the CONTROL Section

 User Admin

i. User Types and site permissions

There are a three different permission types for the site to allow access to add, amend and delete site pages as well as specific access permissions to Control functionality.

Permission Types

- | | |
|--------------------|---|
| Read Only | - The lowest permission the user can not add, or delete items from the tree navigation, they can select a page but will not be able to amend any of the details |
| Read / Modify | - Middle permission, the user can not add, or delete items from the tree navigation, they can select a page and amend and save the details. |
| Read / Add /Modify | - Highest permission, the user can add, delete, move items within the tree navigation, they can select a page and amend and save the details. |

Access Permissions

There are specific permission settings to allow user to access the areas within the Control section. You can grant any user permissions to access these facilities within their individual user accounts.

ii. Adding a user

To add a user to the system, access the 'User Admin' Control facility and choose 'Add' you will then be presented with a screen to fill in the user details.

User Detail

Firstname:

Lastname:

Username:

Password:

Email:

Permission Type:

Read / Add / Modify ▼

CONTROL - Accessible Admin Functions

Data Export ☐

Configuration ☐

User Admin ☐

Cancel

Save

iii. Editing a user

To edit a users profile, access the 'User Admin' Control facility, select the user by clicking on their name within the table at the top, this will select the user and populate the user detail below. Click 'Edit' and you will be able to modify the user details, update permissions and access. Click 'Save' when complete.

User Detail

Firstname:	soVision	Lastname:	soVision
Username:	soVision	Password:	
Email:	info@sovision.com		

Permission Type:

CONTROL - Accessible Admin Functions

Data Export	☒	Configuration	☒
User Admin	☒		

iv. Deleting a user

To delete a users profile, access the 'User Admin' Control facility, select the user by clicking on their name within the table at the top.

User Detail

Firstname:	test	Lastname:	test
Username:	test		
Email:	test		

Permission Type: Read / Add / Modify

This will select the user and populate the user detail below. Click 'Delete' and you will be asked to confirm you want to delete.





10. More Help

If you require any further help, please don't hesitate to contact us either on 0845 4503669 or through your [soSupport](#) account.